

TECH PREP
INDUSTRY SECTOR
REQUEST FOR APPLICATIONS (RFA)
SPECIFICATIONS

AS AUTHORIZED BY

2000-2004
CALIFORNIA STATE PLAN
FOR
VOCATIONAL AND TECHNICAL
EDUCATION

IN FULFILLMENT OF THE REQUIREMENTS OF THE
CARL D. PERKINS VOCATIONAL AND
TECHNICAL EDUCATION ACT OF 1998
P.L. 105-332

DECEMBER 2001

RFA Directions

Funding Source: Carl D. Perkins, Vocational-Technical Education Act
Funding Category: Title II - Tech Prep Education
RFA Title: Tech Prep Industry Sectors Programs
Funds Available: \$ 2,023,567
Amount of Award: \$ 289,081
Application must be received by: February 28, 2002

Eligible Applicants

Applicants will be limited to the 80 Tech Prep Local Consortium identified by the Chancellor of the California Community Colleges for the 2001 contract year. Each application must represent a consortium that includes at least one community college, local feeder high schools, Regional Occupational Centers and Programs, industry partners from the selected Industry Sector and, as appropriate, representatives from a California State University or University of California.

Application Limitations

One application must be submitted for **EACH** Industry Sector the applicant wishes funded. More than one application may be submitted by each consortium. Local Consortium that include more than one community college may receive up to two Industry Sector grants. Preference will be given in the form of five (5) bonus points once the threshold of 80 points has been reached to Local Consortia that have not previously received an Industry Sector grant. Local Consortium comprised of a single community college will be limited to one Industry Sector grant. Industry Sectors eligible for funding for 2001 are listed in Appendix A1. Three (3) Industry Sector grants for the FY 2001 - 02 and four (4) Industry Sector grants for the FY 2002 - 2003 will be awarded.

Funding period

Three awards will be granted for the period May 1, 2002 – April 30, 2003. Four additional awards will be granted for the period July 1, 2002 – June 30, 2003.

Funding levels

Each Industry Sector will be funded for two-hundred eighty nine thousand and eighty-one dollars (\$289,081) for the initial funding year (Year 1). Year two will be funded at one hundred and twenty-three thousand eight hundred and ninety-two dollars (\$123,892) and year three at fifty-three thousand and ninety-seven dollars (\$53,097). Year two and three funding will be contingent on availability of funds and successful progress on the preceding year's outcomes.

Subcontracting

The total of all subcontracts are subject to certain limitations as noted in Appendix K Agreements with Other Governmental Entities and Their Auxiliaries.

Selection Process (maximum points possible = 105)

All eligible applications will be read, reviewed and ranked by knowledgeable professionals with expertise in the specific Industry Sector(s) being examined. Finalists may be required to participate in a team interview prior to final selection. Team interviews, if needed, will be held in Sacramento.

Appeal Process

An appeal process has been established for applicants that do not receive a score rendering eligibility for funding. Refer to Appendix M.

Application Forms

Applications must be submitted on Industry Sector forms. Industry Sector applications submitted on Innovative Practices and Programs forms will not be accepted.

NOTE: Applications will not be accepted by Fax or E-mail!

Mail completed application to:

Gina Murray
California Department of Education
Career Development and Curriculum Leadership Unit
721 Capitol Mall, 4th Floor
Sacramento, CA 95814
Phone: (916) 657-2640
E-mail: gmurray@cde.ca.gov

Request for Applications may be accessed at: <http://www.cde.ca.gov/funding/>

Tech Prep Project Overview

Definition

The term ¹ “tech-prep program” means a program of study that-

- (A) combines at least 2 years of secondary education (as determined under State law) and 2 years of postsecondary education in a non-duplicative sequential course of study;
- (B) strengthens the applied academic component of vocational and technical education through the integration of academic, and vocational and technical instruction;
- (C) provides technical preparation in an area such as engineering technology, applied science, a mechanical, industrial, or practical art or trade, agriculture, a health occupation, business, or applied economics;
- (D) builds student competence in mathematics, science, and communications (including through applied academics) in a coherent sequence of courses; and
- (E) leads to an associates degree or a certificate in a specific career field, and to high skill, high wage employment, or further education.

Statement of Need

The recent, fundamental shift of the California economy to a foundation in technology and service has radically re-defined the skills sets required of the workforce. To the extent that the public schools and colleges are the primary providers of workforce preparation, it is critical that they direct their resources toward ensuring their curricula do indeed prepare students for real jobs in the real industries that comprise the economy. Acting on that common imperative, the California Department of Education has identified the most dynamic industries in the new economy that are high employing and those that have high employing potential in which to establish articulated career pathways.

Project Design

These pathways will be academically rigorous, and provide students with not only the fundamental skills that are required for post-secondary admission but also the technical skills that will enable them to have successful careers in California's new, highly technical economy.

Within this context the focus of the projects, as approved in the 2000-2004 California State Plan for Vocational and Technical Education, will be to address three (3) components:

1. Develop Articulated Curriculum Models
2. Create Multi-measure Assessment
3. Provide Staff Development Programs

The components are designed to be delivered by Local Consortium that provide integrated and articulated instruction for students as detailed in the definition.

¹ as defined in The Carl D. Perkins Vocational and Technical Education Act of 1998.

Reporting Requirements

Each grant recipient shall submit quarterly year-to-date expenditure and progress reports. The format for these reports will comply with California Department of Education contracting regulations.

The reports shall include a detailed description of significant project outcomes. Project outcomes are demonstrated results of the project activities. Descriptions of activities should only relate to the objective(s), see pages 6 and 7, and scope of the project.

Ongoing contact with the Project Monitor will be required. Funded projects may also be subject to one or more formal site visits during the period of performance.

Amendments and other contract revisions must be approved by the Project Monitor.

Application Content

To be considered for funding, each application must contain the items listed below in the order listed. Original signatures must be included on two (2) copies of the ten (10) to be submitted. The application is to be stapled in the top left hand corner (do not use binders or folders). Please do not submit information other than that requested in the Application Content.

The application is to be prepared in the following format:

- One point five (1.5) line spacing.
- Eleven (Arial) or twelve (Times New Roman) point font.
- Easy to read font; Arial or Times New Roman.
- One (1) inch margins on all sides.

Refer to RFA Directions, page i, for submission details.

Note: required certifications and assurances, with the exception of item 2, will accompany the contract once the successful applications have been selected.

Total possible points for the application are 105. Point distribution is as follows:

Narrative	15 points
Work Plan	60 points
Administrative Capacity	10 points
Project Management	5 points
Budget Detail and Summary	10 points
Bonus	5 points

Descriptions of each item to be included in the application in the order in which each item is placed, follows:

1. Cover Sheet

The Cover Sheet form, Appendix B, is the first item in the application package. When completing the application Cover Sheet, select the Industry Sector from the list in Appendix A1. The project management team must include representatives from each education segment; secondary, ROCP and community colleges and at least one industry representative from each sub group within the selected Industry Sector. For example, Industry Sector: Energy and Utilities

Industry Sub Groups: Petroleum Industry
Alternative Power and Energy Production
Utilities Industry

Each member of the management team must provide an original signature as noted on the Cover Sheet. The Consortium Director must also provide an original signature. Two (2) copies with original signatures are required with eight (8) additional copies provided.

Signatures of the remaining Local Consortium members will be required before the final contract is promulgated.

2. Certification

The Certification form, Appendix C, must be signed as noted on two (2) copies and included in the application as item 2.

3. Board Resolution

The application must include a copy of the resolution, order, motion or ordinance of the local governing body by law having authority to enter into the proposed contract approved and authorizing execution of the agreement. Appendix D describes the various options. Appendix E offers a sample Board Resolution that can be adapted for the purpose of meeting this requirement. An original signature is required on two (2) copies. The Board Approval shall be item 3.

4. Table of Contents

Applications must include a Table of Contents. The Table of Contents is the fourth item of the application. All pages of the application must contain page numbers centered at the bottom of each page. The Table of Contents must list each component of the application beginning with item 5, Narrative.

5. Narrative (15 points)

The narrative is to describe the capacity of each Local Consortium to complete the proposed Work Plan and implement the results. Not to exceed five (5) pages. Note: any content beyond five pages will be discarded and will not be considered for point value of the section.

The narrative shall include the following information:

- Scope of work must include at least 3 sub groups (or career paths) of the Industry Sector as noted in Appendix A.
- Outcome statements from the Work Plan.
- Evidence of ability to perform the work described in the Work Plan.
- Examples of similar past work (include with attachments).
- Members of the management team and their roles.

6. Work Plan (60 points)

The Work Plan will be displayed on forms provided in Appendices F1, F2 and F3. The Work Plan is to address the three (3) objectives approved in the State Plan as listed and defined on pages 6 and 7. The Work Plan is to be no more than a total of 20 pages. When completing each Work Plan form:

- Outcomes Column-list specific outcomes that will collectively meet each objective.
- Activities Column-list detailed activities for each outcome.
- Timeline Column-list approximate beginning and ending dates for each activity. The ending dates must be within the first year of funding. The Outcomes may be repeated for years two and three of the project in subsequent applications, however, the activities should not be repeated.
- Staff Column-identify the lead staff member for each activity. If the staff member has not yet been identified by name list by title from the organizational chart.

The Work Plan must address at least three (3) of the sub groups (career paths) within the selected sector.

7. Administrative Capacity (10 points)

The Local Consortium must demonstrate that they operate developed Tech Prep programs. Applicants are to summarize the facets of their program, providing insight into the depth and breadth of the Tech Prep program; the scope of career pathways offered with clearly defined articulated sequences of courses; strategies for measuring student participation in the articulated coursework; student follow up to determine number of students that are accessing the articulated program; and finally inclusion of high school faculty and curriculum

coordinators, community college faculty, academic senate, and articulation officers in the Tech Prep program. Limit this section to no more than three (3) pages.

8. Project Management (5 points)

The project management team must be comprised of representatives from the Local Consortium; community college, feeder high schools, ROCP and business partners from the various sub groups of the selected Industry Sector. List those individuals by name and title. Describe their capability based on prior experience to manage the completion of the objectives, outcomes and activities as detailed in the Work Plan. Limit this section to no more than two (2) pages.

Include an organizational chart that displays the management structure and responsibility of each management team member. The organizational chart should be included as attachment 1.

Also include a VITAE (a brief biographical sketch) in the attachment section for each member of the management team.

9. Budget Detail and Summary (10 points)

The budget detail is to be described on the Budget Detail form, Appendix G, and adhere to the State Contracting Manual Contract Budgets criteria, Appendix I. Refer to Appendix J for Equipment Purchases and Appendix K Agreements with other Governmental Entities and Their Auxiliaries for limitations on equipment purchases and subcontracting. Travel and related expenditures shall be calculated at rates not to exceed those established in accordance with and allowable pursuant to Department of Personnel Administration regulations. Refer to Appendix L for specifics.

Out-of-state travel must receive prior approval from the contract monitor. Include the projected cost in the Budget Detail for proposed out-of-state trips if it can be demonstrated that the expenditure is justified in meeting the objectives of the contract. Specifics related to out-of-state travel are also noted in Appendix L.

Note: All expenditures for equipment, personnel and travel must include a description clearly showing how each is essential for meeting the objectives of the grant.

Summarize expenditures on the Budget Summary form, Appendix H. Note that there is a limitation of 5% for Administrative Costs and 4% for Indirect Costs as determined by the Federal Carl D. Perkins Vocational and Technical Education Act, 1998.

10. Attachments (not included in page counts)

Examples of similar past work (required)

Management Organizational Chart (required)

VITAE for members of the management team (required)

Proposal Objectives and Criteria

Address the Objectives and Criteria when completing the Work Plan forms, Appendices F1, F2 and F3. Some of the criteria may be more appropriately addressed in years two and three. Enter Outcomes and Activities on the Work Plan only for those criteria that will be addressed in year one.

Work Plan Form F1

Objective 1: **Develop collaborative and systematic articulated curriculum models among high schools and community colleges.**

Criteria:

- a) Articulated sequence of coursework must span at least grades 11-14. Projects are encouraged to develop articulation models that link coursework as early as grade 7 or extend through grade 16.
- b) Articulated curriculum shall include at least three (3) career paths encompassed in the selected Industry Sector. Refer to Appendix A1 for detail.
- c) Industry Sector-based career path sequences must be comprehensive enough to ensure the fulfillment of academic discipline requirements for post secondary articulation.
- d) Integration between academic content and career path content shall be demonstrated.
- e) State or National academic and skill standards aligned to the selected Industry Sector shall be considered and adopted or adapted as appropriate.
- f) Career paths shall be informed by and link to the California Community College New and Emerging Technologies and Program Areas, Appendix A2.
- g) The ten (10) State adopted Foundation Standards as described for the selected Industry Sector shall be incorporated:
 - Academic Foundations
 - Communications
 - Employability Skills
 - Ethics
 - Information Technology Applications
 - Legal Responsibilities
 - Safety Practices
 - Systems
 - Teamwork
 - Technical Skills

Work Plan Form F2

Objective 2: **Create multi-measure assessment models that measure student achievement at varying points along the career paths within the selected Industry Sector.**

Criteria:

- a) Multi-measure assessment models shall measure the content included in the articulated curriculum models.
- b) The measures shall provide assurance that learners have achieved skills and knowledge needed to enter the next level of preparation within the articulated career path.
- c) Multi-measure assessment models shall include both on-demand (demonstration, expanded multiple choice, presentation, scenario response) and cumulative (project, portfolio, case study, research paper) methodologies.
- d) Multi-measure assessments shall be aligned with the statewide testing program.

Work Plan Form F3

Objective 3: **Provide staff development programs on implementation of the articulated curriculum models and the multi-measure assessment models.**

Criteria:

- a) Design staff development materials that can be infused into teacher preparation (pre-service) programs on the use of articulated curriculum and multi-measure assessment.
- b) Prepare a staff development program on the use of articulated curriculum and multi-measure assessment for distribution through the Tech Prep Local Consortium staff development activities.
- c) Prepare staff development programs for distribution at local, regional and statewide conferences, workshops, through electronic networks and other staff development events.
- d) Access existing resources such as tool kits, guides, videos, CD's and other items for continued distribution.
- e) Prepare staff development programs for a variety of audiences including faculty from secondary and postsecondary education agencies, teacher candidates, business and industry partners, counselors, administrators and other stakeholders.

Appendices Table of Contents

A1	Industry Sectors Eligible for Funding
A2	California Community Colleges Programs
B	Application Cover Sheet (signatures required)
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F3	Workplan
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Appendix A1

Industry Sectors Eligible for Funding

December 2001

Industry Sectors - Industry Sectors are identified as broad industry groups with common products, services and working environments. The Industry Sectors and subgroups (career paths) eligible for 2001 – 2002 (3 awards) and 2002 – 2003 (4 awards) funding are:

Energy and Utilities - includes services and products related to the Petroleum Industry; Alternative Power and Energy Production and the Utilities Industry

Fashion and Interiors - includes services and products related to Apparel Design and Manufacturing; Commercial Interior Design; Residential Design and Furnishings; Textile Design and Manufacturing and Textile Care and Maintenance

Finance and Business - includes services and products related to Financial Services; Real Estate Services and Business Management

Hospitality, Tourism and Recreation - includes services and products related to Amusement; Recreation and Special Events; Food Services; Lodging Services; Travel and Related Services and Recreational Sports

Public and Private Education Services - includes services and products related to Preschool; Elementary and Secondary Education; Colleges; University and Professional Education; Trade, Technical Education and Training; Child and Youth Services and Educational Support Services

Retail and Wholesale Trade - includes services and products related to Retail Sales, Distribution and Service; Wholesale Sales, Distribution and Service; Business Management and International Trade

Transportation - includes services and products related to Air Transportation; Land Transportation and Water Transportation

Appendix A2

California Community Colleges Programs

New and Emerging Technologies (economic development initiatives):

Advanced Transportation Technologies

Advanced Transportation Technologies (ATT) Centers were created to transform the workforce in the rapidly developing, technologically driven transportation industry, while improving the environment and stimulating the economy. The ATT Centers provide training in the areas of alternative fuels, alternative fueled vehicles, intelligent transportation systems, wireless communication and newly emerging AFV technologies.

Applied Competitive Technologies

Centers for Applied Competitive Technologies (CACT) enhance the competitiveness of California's small and medium-sized manufacturers by facilitating the transfer and adoption of advanced and environmentally sound manufacturing technologies and techniques, by assisting in the deployment of new technologies. CACTs provide continuous improvement techniques, allowing California manufacturers to remain competitive in changing markets and a global economy, through the use of demonstration sites built around a computer-integrated manufacturing and/or process technology.

Biotechnologies

Biotechnology is one of the fastest growing industries in California. Biotechnology is a series of technologies which involve the manipulation of living organisms or their sub-cellular components to provide useful products or services. The Statewide Biological Technologies Initiative is laying the groundwork for comprehensive educational programs to prepare the workforce for new jobs. The Biological Technologies Initiative's primary goal is to facilitate and enable improved community college effectiveness in supporting biotechnology-related economic development in California.

International Trade Development

The goals of the Centers for International Trade Development (CITD) are to enhance the competitive strength of California businesses in the international trade marketplace and support international trade development in their local communities. The CITDs' strengths include direct assistance to small and medium sized businesses through one-on-one counseling, seminars, multi-part training series, trade leads, foreign market research and prospect identification. The CITDs have also assisted community colleges in internationalizing curriculum and developing specialized courses in international trade.

Business and Workforce Performance Improvement

Nine regional Centers of Excellence focus on outsourced training and development services purchased by California's employers. The Centers provide a performance-based delivery system to meet employers' demands for accountability, measuring training success by its impact on individual and business performance improvement, rather than the acquisition of knowledge or skills.

Health Care Delivery

The purpose of the Economic Development Health Care Initiative is to identify workforce needs of the health care delivery system and develop solutions through a comprehensive, problem-solving process. The role of the RHORC is to facilitate collaboration between the education segments and the health care delivery system to respond to identified needs.

New Media/Multimedia/Entertainment

One of California's fastest growing business sectors is the emerging New Media/Multimedia/Entertainment Industry, which includes businesses that produce and support internet/intranet Web sites, design interactive digital game and educational software, generate feature film animations and special effects, prepare two and three-dimensional graphics, produce digital video titles, compose digital music soundtracks, or develop software tools to support the above mentioned activities. To meet the growing workforce demand of the various industry segments, the colleges have developed a network of regional centers to respond to the critical needs with a variety of critical services.

Environmental Technologies

Regional Environmental Business Resource and Assistance Centers (REBRAC) coordinate statewide programs and services in support of environmental compliance regulations. REBRACs enhance the competitiveness of California's small and medium-sized manufacturers and service sector businesses by expediting the transfer and adaptation of environmentally sound technologies, procedures and techniques.

Small Business Development Centers

The purpose of the Small Business Development Center (SBDC) initiative is to grow California business, through the delivery of one-on-one counseling, seminars, workshops, conferences and other technical activities. Small business services include management, marketing, financing, accounting, strategic planning, regulation, taxation, capital formation, procurement, human resource management, production, operations, agribusiness, computer applications, limited business law assistance, office automation, site selection and many more areas of small business assistance. This initiative is part of a national program and is a partnership with state and federal agencies.

Workplace Learning Resource Centers

Through these Centers, the community colleges provide business and industry with a variety of workplace learning services, including occupational-specific skills assessments, task analysis, basic skills, English as a Second Language, analytical and problem-solving skills and teamwork. Services are customized and flexible to meet employers' incumbent worker upgrade training needs, and are critical to California's ability to provide a highly trained and diverse workforce.

Under Development:

Information Technologies
e-Commerce
e-Trade

Programs Areas:

- a. Agriculture and Natural Resources
- b. Business Education
- c. Family and Consumer Science
- d. Engineering and Industrial Technology
- e. Health Occupations
- f. Public Safety

Appendix B California Tech Prep Industry Sector Application COVER SHEET

Industry Sector _____
Proposed Funding \$289,081

CONSORTIUM INFORMATION (Please print or type information)

Consortium Name ¹ _____			
Consortium Mailing Address _____	City _____	State _____	Zip _____
Consortium Director _____	Consortium Director Signature _____		
Fiscal Agent Name ² _____	Fiscal Agent Tax ID Number _____		
Primary Consortium Contact Name _____	Primary Consortium Contact Title _____		
Primary Consortium Contact Address _____	City _____	State _____	Zip _____
Primary Consortium Contact E-mail Address _____	Phone _____	Fax _____	

Include an original signature for all consortium members from schools, districts, colleges and ROCP's. Attach separate sheets if needed. Names may be entered without signatures with the application but signatures must be submitted before the final contract is promulgated. Indicate with an asterisk those members that will serve on the management team.

Name of Secondary System Representative _____	Original Signature (required) _____	Date _____
Name of Secondary System Representative _____	Original Signature (required) _____	Date _____
Name of Post-Secondary Representative _____	Original Signature (required) _____	Date _____
Name of Post-Secondary Representative _____	Original Signature (required) _____	Date _____
Name of ROCP Representative _____	Original Signature (required) _____	Date _____
Name of Industry/Business Representative _____	Original Signature (required) _____	Date _____
Name of Industry/Business Representative _____	Original Signature (required) _____	Date _____

¹ As identified by the Chancellor's Office of the California Community Colleges for the 2001 contract year

² Authorized fiscal agent for the Local Consortium

Additional Signatures of Required Partners (if necessary):

_____ Name of Secondary System Representative	_____ Original Signature (required)	_____ Date
_____ Name of Secondary System Representative	_____ Original Signature (required)	_____ Date
_____ Name of Secondary System Representative	_____ Original Signature (required)	_____ Date
_____ Name of Secondary System Representative	_____ Original Signature (required)	_____ Date
_____ Name of Post-Secondary Representative	_____ Original Signature (required)	_____ Date
_____ Name of Post-Secondary Representative	_____ Original Signature (required)	_____ Date
_____ Name of Post-Secondary Representative	_____ Original Signature (required)	_____ Date
_____ Name of Post-Secondary Representative	_____ Original Signature (required)	_____ Date
_____ Name of ROCP Representative	_____ Original Signature (required)	_____ Date
_____ Name of Industry/Business Representative	_____ Original Signature (required)	_____ Date
_____ Name of Industry/Business Representative	_____ Original Signature (required)	_____ Date
_____ Name of Industry/Business Representative	_____ Original Signature (required)	_____ Date
_____ Name of Industry/Business Representative	_____ Original Signature (required)	_____ Date

Appendix C Certification

I hereby certify that all applicable state and federal rules and regulations will be observed; that to the best of my knowledge, the information contained in this application is correct and complete; and that the requirements of this application are accepted as the basic conditions in the operations of this project/program for local participation and assistance.

Name of Consortium Director

Original Signature (required)

Date

Name of Primary Contact Person

Original Signature (required)

Date

Name of Person Preparing Application

Original Signature (required)

Date

Appendix D

Board Approval Instructions

The following descriptions apply:

- **Resolution** – a formal expression of the opinion or will of an official body or public assembly, adopted by vote. A valid resolution is one which was passed and sets forth the roll call on the resolution, is signed and approved by the Chairman, and is attested to by the personnel responsible for custodianship of the records for the governing body.
- **Motion or Minutes of the Meeting** – records that show the motion was passed by the voting body. These records must be certified to indicate that they are true excerpts certified by the personnel responsible for custodianship of the records.
- **Ordinance** – a term used to designate the enactments of the legislative body of the municipal corporation, which are of a general and permanent nature. If excerpts from code books are used, a letter of source documentation should be submitted.
- **Order** – a mandate, command, or determination of an administrative body or agency. An order should contain a statement of what is ordered, be dated, and signed and/or approved by an administrative body.

NOTE: If a resolution, or motion or minutes of the meeting are used to satisfy the board approval requirements, two (2) of the ten (10) copies of the application must be submitted with an original signature on this document.

If the procedures of your “Official/Governing Body” do not allow for pre-approval of contracts and/or waiting for this resolution will prevent you from meeting the application deadline, send a single page entitled “Resolution Place Holder” and place this page behind the Certification form. This page should contain an explanation as to the approval policy and anticipated date for submission of the completed and signed documents.

Appendix E Board Approval Form (Sample)

[The following requirements can be met using a resolution, motions or minutes, ordinance, etc. - see Board Approval Instructions, Appendix D]

Whereas, this resolution must be adopted in order to certify the approval of the

(Name of Community College District)

to approve a contract with the California Department of Education for the Tech Prep

(Name of Sector) Industry Sector Project for the
FY 2001 – 2002 or FY 2002 – 2003 (to be determined following selection process).

Now, Therefore, Be It Resolved, that the Governing Board of the

(Name of Community College District)

does hereby order that _____ (Name, Title) be authorized as
representative to sign said agreement on behalf of the Governing Board.

In Witness Whereof, the foregoing Resolution was passed and adopted by the Board of Education of
the _____ (Name of Community College District), this
_____ day of _____, 2002.

AYES: _____

NOES: _____

ABSENT: _____

(Name & Title of authorized representative)

Attest:

Clerk of the Board

Appendix F1
Work Plan

Objective #1: Develop collaborative and systematic articulated curriculum models among high schools and community colleges.

Industry Sector _____ (List only one) Subgroups _____ (List at least three)

OUTCOMES	ACTIVITIES	TIMELINE	STAFF

Appendix F2
Work Plan

Objective #2: Create multi-measure assessment models that measure student achievement at varying points along the career paths within the selected Industry Sector.

Industry Sector _____ (List only one) Subgroups _____ (List at least three)

OUTCOMES	ACTIVITIES	TIMELINE	STAFF

Appendix F3
Work Plan

Objective #3: Provide staff development programs on implementation of the articulated curriculum models and the multi- measure assessment models.

Industry Sector _____ (List only one) Subgroups _____ (List at least three)

OUTCOMES	ACTIVITIES	TIMELINE	STAFF

Appendix G Budget Detail

Name of Consortium _____

Name of Industry Sector _____

Budget Classification	Description	Direct Program Expenditures	*Administration (not to exceed 5% of the total grant award)	Totals
1000	Certificated Salaries/Professional Staff • Itemized Detail			
2000	Classified Salaries • Itemized Detail			
3000	Employee Benefits • Itemized Detail			
4000	Books and Supplies • Itemized Detail			
5000	Services, Conference, Travel and other Operating Expenses • Itemized Detail			
6000	Capital Outlay/Equipment (must support workplan objectives) • Itemized Detail			
Subtotal				
7000	Indirect rate limit to 4% of direct program expenditures • Itemized Detail			
Total Costs (Class 1000-7000)				

* **Administration includes:** overall system management, coordination, general administrative functions, mandated meetings, travel to monitor subcontract recipients, equipment used in the overall system management, coordination and general related functions.

** Attach additional pages if necessary.

Appendix H Budget Summary

Name of Consortium _____

Name of Industry Sector _____

Budget Classification	Description	Direct Program Expenditures	*Administration (not to exceed 5% of the total grant award)	Totals
1000	Certificated Salaries/Professional Staff			
2000	Classified Salaries			
3000	Employee Benefits			
4000	Books and Supplies			
5000	Services, Conference, Travel and other Operating Expenses			
6000	Capital Outlay/Equipment (must support workplan objectives)			
Subtotal				
7000	Indirect rate limit to 4% of direct program expenditures			
Total Costs (Class 1000-7000)				

* **Administration includes:** overall system management, coordination, general administrative functions, mandated meetings, travel to monitor subcontract recipients, equipment used in the overall system management, coordination and general related functions.

Appendix I

Contract Budgets

If payment is on a cost reimbursement basis, the following items should be included and all unit rates must be extended and totaled:

1. Personal service costs showing individual or position rates per unit of time
2. Fringe benefits costs citing actual benefits or a percentage of personal services costs
3. Operating expenses including rent and supplies
4. Equipment costs specifying equipment to be purchased and the disposition of the equipment at the end of the contract (see Appendix J)
5. Travel expenses and per diem set at the rate specified by the Department of Personnel Administration for similar employees or verification supplied that such rates are not available to the contractor
6. Indirect
7. Other specific breakdown required

Appendix J

Equipment Purchases

- A. When equipment is purchased or built with state funds as part of the contract the contract must clearly state that title to any equipment purchased or built with state funds will vest in the State. On termination of the contract, the State may:
1. Request such equipment be returned to the state, with costs incurred by the contractor for such return being reimbursed by the state.
 2. Authorize the continued use of such equipment for work to be performed under a different agreement or contract.
- B. The state may, at its option, repair any damage or replace any lost and stolen items and deduct the cost thereof from the contractor's invoice to the state, or require the contractor to repair or replace any damaged, lost, stolen equipment to the satisfaction of the state with no expense to the state. In the event of theft, a police report must be filed immediately. (Refer to SAM § 2625.)
- C. The contractor should maintain an inventory record for each piece of non-expendable equipment purchased or built with funds provided under the terms of a contract. The inventory record for each piece of such equipment should include the date acquired, total cost, serial number, model identification (on purchased equipment), and any other information or description necessary to identify said equipment. Non-expendable equipment so inventoried are those items of equipment that have a normal life expectancy of one year or more and an approximate unit price of \$5,000 or more. In addition, theft-sensitive items of equipment costing less than \$5,000 should be inventoried. A copy of the inventory record must be submitted to the state on request of the state. (See MM 95-22.)
- D. Procedures for the handling and accounting of equipment through contracts is the same as that for handling through regular state purchasing.

Appendix K

Agreements with other Governmental Entities and their Auxiliaries (subcontracting)

A. Government entities/auxiliaries exempt from competitive bidding: Agreements for services and consultant services do not require competitive or proposals if the contract is with:

1. Another state entity, including:
 - a. A governmental agency from any state (PCC § 10340)
 - b. A state college or state university from any state.
2. A local governmental entity or agency, including those created as a Joint Powers Authority (JPA)
3. An auxiliary organization of the CSU, or a California community college
4. The Federal Government
5. A foundation organized to support the Board of Governors of the California Community Colleges, or
6. An auxiliary organization of the Student Aid Commission established under Education Code § 69522.

B. Administrative overhead fees: Agencies shall assure that when services are subcontracted by entities in Section A that all administrative fees are reasonable considering the services being provided and the oversight required. Agencies may only pay overhead charges on the first \$25,000 for each subcontract.

C. No subcontracting to circumvent competitive bidding: Services to be provided by entities listed in Section A, above are to be performed primarily with the staff of the public entity or, in the case of the educational institutions, auxiliaries or foundations, by the faculty, staff or students associated with the particular educational institution. Agreements with entities listed in Section A are not to be used by state agencies to circumvent the state's competitive bidding requirements. (PCC § 10340)

D. Subcontracting without limitation: Services may be subcontracted without restriction only when:

1. The primary agreement is a subvention agreement, or
2. The total of all subcontracts does not exceed \$50,000 or 25% of the total contract, whichever is less, and that subcontracting is not done for the purpose of circumventing competitive bidding requirements.

E. Subcontracting subject to limitations: If the total of all subcontracts exceeds \$50,000 or 25% of the total contract, whichever is less, then subcontracting shall be permissible only if:

1. All subcontracts are with entities listed in Section A, or with other academic institutions of higher education, or consortia of academic institutions of higher education, or the services to be provided under the subcontract are otherwise exempt from competitive bidding, or
2. If all subcontracts are not with entities listed in Section A, then all subcontracts not awarded to entities listed in Section A, or all subcontracts not exempt from competitive bidding shall require the following:
 - a. Prior written approval from DGS/OLS, or,
 - b. Certification that the subcontractor has been selected by the prime contractor pursuant to a bidding process requiring at least three bids from responsible bidders, or,
 - c. Approval by the agency secretary or highest executive officer, attesting that the selection of the particular subcontractor(s) without competitive bidding was necessary to promote the agency/department program needs and was not done for the purpose of circumventing competitive bidding requirements. (PCC 10410)

Appendix L

Travel and per diem Limitations

A summary of the State of California Short-term Travel Expense Reimbursement Program Administered by the Department of Personnel Administration

Conditions of Travel

Each State agency determines the necessity for and the method of employee business travel. Effective 1/1/92, reimbursement shall not be made for meal and lodging expenses incurred within 50 miles of home or headquarters. Authority to approve exceptions was delegated to appointing powers as follows: to approve meals and/or lodging for employees *on travel status* away from, but within 50 miles of home or headquarters. Delegation does not extend to the approval of meals or lodging **at** either the home or headquarters location.

Lodging Reimbursement Rates- In State

Applicable when State business requires an overnight stay and the employee uses a good, moderately priced commercial lodging establishment (hotel, motel, bed and breakfast or public campground) that caters to the short-term traveler, and for day trips of less than 24 hours.

Lodging Reimbursement- (receipt required)

Statewide, except as below* up to \$ 84.00 + tax

* Counties of Los Angeles and San Diego up to \$ 110.00 + tax

* Alameda, San Francisco, San Mateo, Santa Clara up to \$ 140.00 + tax

Note: Get a confirmation number when you make your reservations and use it when you check in. Travelers who do not provide a lodging receipt are eligible to claim meals/incidentals only as appropriate to the time frames of travel (See below for rates and time frames).

Mileage Reimbursement Rates

All privately owned vehicle mileage driven on State business is subject to advanced approval by the appointing authority. The rate claimed shall be considered full reimbursement for all costs related to the operation and maintenance of the vehicle, including both liability and comprehensive insurance.

Automobile	34 cents per mile
Spec. veh. w/cert up to	37 cents per mile
Private aircraft up to	50 cents per mile
Bicycle up to	4 cents per mile

If dropped off and picked up at a common carrier and no parking expense is claimed, mileage to and from the common carrier may be claimed at the above appropriate rate times twice the number of miles you actually occupy the vehicle (pays for each round trip).

Conferences/Conventions- (Rooms that are contracted by the sponsors for the event)

- State sponsored:
Appointing power delegated to approve lodging with receipt: up to \$ 110.00 + tax
- Non-state sponsored:
Appointing power delegated to approve lodging with receipt up to the rate contracted for the event

Meals and Incidentals- (each 24 hr. period)

Breakfast:	<u>actual expense up to</u>	\$ 6.00
Lunch:	<u>actual expense up to</u>	\$ 10.00
Dinner:	<u>actual expense up to</u>	\$ 18.00
Incidentals:	<u>actual expense up to</u>	\$ 6.00

Note: **YOU** must retain all meal receipts for audit by the state or the IRS.

Timeframes

First Day (Trip of more than 24 Hours):

Trip begins at or after 8am: may claim breakfast

Trip begins at or after 2pm: may claim lunch

Trip begins at or after 7pm: may claim dinner

Fractional Day (After 24 Hours of Travel):

Trip ends at or after 8am: may claim breakfast

Trip ends at or after 2pm: may claim lunch

Trip ends at or after 7pm: may claim dinner

Fractional Day (Trip of less than 24 Hours of Travel):

Trip must begin at or before 6am AND end at or after 9am in order to claim breakfast

Trip must begin at or before 4am AND end at or after 7am in order to claim dinner

No lunch or incidentals may be claimed.

If there is no overnight stay, these meals are taxable.

Note: Full meals included in airfare, hotel and conference fees, or otherwise provided may not also be claimed for reimbursement. The same meal may not be claimed more than once on any date. Continental breakfast of rolls, coffee, and juice are not considered full meals.

Out-of-State Travel

Lodging with receipt: actual expense (subject to department approval)

Meals/incidentals: same rates/requirements as in-state reimbursement

Out-of-Country Travel

Lodging with receipt: actual expense (subject to department approval)

Meals/incidentals: as published by the U.S. Govt. for dates and places traveled

Receipts/Travel Agency/Liaison/Misc:

Receipts are required for each item for expense for street car, ferry fares, bridge and road tolls, local transit, taxi, shuttle or hotel bus and parking over \$10, business phone calls over \$5.00, all gas for rental cars and all lodging, regardless of amount.

Keep all receipts until your claim is filed and paid. You are responsible for your own travel arrangements and your own claim. All travel and business expenses are to be incurred as a result of conducting State business, and are subject to review/verification by the approval authority. Be sure your claim form is complete, submitted timely, with all supporting documents, and IN DUPLICATE.

Appendix M Appeal Process

Appeals of proposal disqualification must be filed within seven (7) calendar days from the postmark date of the disqualification letter. An appeal must be based upon one or both of the following: 1) the action of the review team contravenes published law; or 2) the applicant can demonstrate that the proposal was submitted in a timely manner and contained all of the following criteria:

1. The grant proposal is received on or before the time and date set for receipt of proposals. *Public Contract Code*, Section 10377 (a).
2. The grant proposal is complete as described under RFA Directions and Application Content.
3. Ten (10) copies of the proposal have been submitted with two (2) copies containing the original signature of the Consortium Director and required partners on the Coversheet in Appendix A.
4. The grant proposal does not contain false or misleading statements or references intended to support an attribute or condition contended by the applicant.

The decision of the Perkins Joint Management Team is final. **There is no further appeal process.**